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Evaluation and Summary of PA Site Deaccession by PHMC

Abstract

This thesis evaluated the process by which the Pennsylvania Historical and Museum Commission (PHMC) deaccessioned its publicly owned historical sites through the Blue-Ribbon Report (1981) and the Blue Ribbon Committee (1997) to determine sites response and determine which typology of deaccession was the Most, Less, and Least successful. As a direct result of drastic budgets cuts by the Commonwealth PHMC's sites that it directly administrated and operated dropped from 57 in 1981 to 14 in 2019. The first report in 1981 split the 57 sites into three groups of importance (Most, Less and Least) based on integrity, significance, and historical value. The second report in 1997 ranked the remaining 27 non-deaccessioned sites on the same three criteria with the addition of audience potential and community support. Washington Crossing Historic Park, Morton Homestead, Daniel Boone Homestead, and the P.A Military Museum were selected for evaluation that reflected the four methods of deaccession by PHMC: Transferred, Leased, Partnered, and retained. Through the analysis and interviews held with the four sites gauged how the site responded at the time the reports were released, awareness as of 2020 of the rankings, how deaccession transition occurred, supporting Friends group response, identification of other deaccession factors, and current status of the site. Once addressed, it was possible to ranking the four deaccession typology resulting in: Most-Transfer, Less-Partnered and/or Retained, Least- Leased. This information provides a better understanding of deaccession processes based on budget cuts that could better enhance community, public and administrative understanding.

Keywords

Deaccession, Blue Ribbon Report, Pennsylvania Historical and Museum Commission, Placed Property, Partnered Property

Disciplines

Historic Preservation and Conservation

EVALUATION AND SUMMARY OF PA SITE DEACCESSION BY PHMC

Sarah Jane Knauer

A THESIS

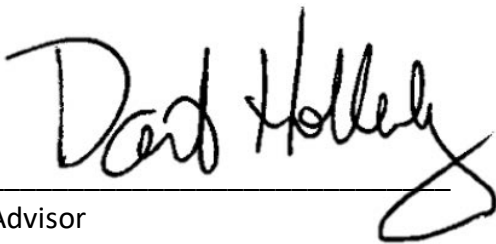
in

Historic Preservation

Presented to the Faculties of the University of Pennsylvania in
Partial Fulfillment of the Requirements of the Degree of

MASTER OF SCIENCE IN HISTORIC PRESERVATION

2020

A handwritten signature in black ink, appearing to read "David Hollenberg", written over a horizontal line.

Advisor
David Hollenberg
Adjunct Professor

A handwritten signature in black ink, appearing to read "fg matero", written over a horizontal line.

Program Chair
Frank G Matero
Professor

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Thank you, PHMC Harrisburg, for being willing to allow me access to the Blue Ribbon Reports files, and secondly, being immensely supportive and enthusiastic about the findings. I hope that this paper highlights the fantastic work your organization has conducted throughout the years under challenging circumstances.

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And lastly, Jonathan. Thank you for being my endless support over the last two years as I chased down my dreams. Having a cup of tea by me that you made will always remind me about how much I love you and how grateful I am to have you. And for the 10,000th time, may I have a cup of tea, please?

-Sarah J. Knauer

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Chapter 1

Introduction

Publicly owned historic sites, such as Ephrata Cloister or Valley Forge, provide history to the public in an accessible and interactive way. Oftentimes allowing visitors to take tours of the grounds or learn about methods of the past, these historic resources allow even the youngest among us to take a step back in time. What many visitors do not know though, are the trials that these landmarks face; they often are at the mercy of governing entities who determine the historic site's budget, or assuming they would even receive one. Throughout the fifty years a number of laws and legislation, like the National Historic Preservation Act and the creation of Section 106 were passed, extending protection to the ever-growing list of historic sites. These new regulations are codependent on the level of funding received in order to uphold these protections or otherwise the programs become stretched to compensate, thus compromising the offered protections altogether. The discussion within this thesis is to cover the topic of historical value, support, and financial understanding that can quickly reverse when the property holder is faced with a cut budget or otherwise lack of revenue from declining (or similar) visitations.

Similarly, to the sites themselves, the state funded entities that provide them support are also at the mercy of the State's fiscal budget. Annually, organizations like PHMC(Pennsylvania Historical and Museum Commission), must methodically evaluate their acquisitions and determine where to allocate the limited funding available, however, decades of drastic cuts resulted in trickle down cuts statewide. In Pennsylvania,

this daunting process is no different, the PHMC is required to weigh in on the historical value of its sites against its budget. The result of PHMC's 1981 and 1997 Blue Ribbon Reports was a well thought out document that would stand as a model for decades to come in deaccession methodology and implementation that still upholds its mission to preserve the Commonwealth's History.

The topic of failing historic sites, more specifically, house museums, has been a pressing topic since the start of the 21st century as state and federal debt were met with comprehensive and extensive budget cuts. While the stance of 'failing' seems crude, it is meant to be candid and relatable to the workers and site administrators who are involved in the day-to-day operation and struggles of a historic site. In the early 2000s, multiple publications and talks were held revolving around the question of "Does America Need another House Museum"¹ and what is to be done with the current ones. For example, Donna Harris, in her 2007 book, *New Solutions for House Museums: Ensuring the Long-Term Preservation of America's Historic Houses*, compiles best practices for alternative uses for house museums after consulting with 50 house museums. Her chapters, supported by case studies, provide potential solutions to the overarching problems facing historic homes that ultimately result in the decision to "retain ownership of the site or sell or donate [the] site."² Her book and others have been part of an ongoing effort to reach

¹ Carol B. Stapp, and Kenneth C. Turino. "Does America Need Another House Museum?" *History news*. 59, no. 3, July 1, 2004, 7–11.

² Harris, Donna Ann. *New Solutions for House Museums: Ensuring the Long-term Preservation of Americas Historic Houses*. Lanham, MD: AltaMira Press, 2007. 6:82

and educate the staff and board members of historic sites about the options available to them.

New and, at times, unexpected funding cuts have instilled fear in the supporters of publicly owned sites. The public frequently holds the belief that it is only a matter of time before their site is deaccessioned, demolished, or sold, especially those that are publicly owned. The extent of this negative response was mainly due in part to the lack of understanding of the limited available resources and transparency between supporters and stakeholders of the site. Twenty-six years before Harris's handy guide and the large scale response from the historic preservation field, the PHMC would be the first large historic property steward in the Commonwealth to face drastic funding cuts that would clearly result in the proposed deaccession overtime of the fifty-seven historic sites under its possession. This thesis investigates the methodology created by PHMC to determine how sites would be ranked, including historical significance, prescribes the avenues of deaccession, and utilizes four case study sites to demonstrate the varying effects of the decisions by PHMC.

Methodology

Since 1981 PHMC has proposed and authorized deaccession avenues for thirty-five of its fifty-seven historic sites.³ Addressing each of the approximately forty-seven sites that PHMC has deaccessioned since 1981 would have expanded the scope of the thesis past its given time frame for completion. Therefore, it was necessary to develop an alternative

³ As of 2019 this total is 60 sites with the addition of 3 sites after the Blue Ribbon Report.

selection method to select appropriate case studies for this thesis, based on the previously used deaccession methodologies in relation to the developed ranking system in PHMC's previous studies. This method of site selection was done by comparing the raw numerical data collected from the rankings of PHMC's two Blue Ribbon Reports, which was used to determine the varying levels of Historical significance and importance each site held, as described further in Chapter 4 below. The following is a brief timeline detailing the total sites PHMC had during each study:

1981: PHMC conducted its first Blue Ribbon Report, State mandated. (57 sites)

- Created 3 categorical rankings for 57 sites, Most, Less, and Least important.
- 22 “Most” sites, Retained by PHMC ⁴
- 35 “Less” and “Least” sites, proposed for deaccession avenues.

1997: A second site evaluation report was conducted, PHMC mandated. (27 sites)⁵

- Recommendations and ranking given for each site, no direct proposal for deaccession. Created 25 rankings for the 27 sites.

⁴ Three of the retained sites were deaccessed by the second report in 1997.

⁵ Between the two Reports PHMC acquired one additional property. Seven sites evaluated were properties previously proposed for deaccession in the 1981 report. During the 1997 report PHMC still had full management and operations of those seven sites – hence their evaluation.

2019: Status of all sites deaccessioned and PHMC managed. (60 sites total, 3 added post Blue Ribbon Reports)

- 13 sites: PHMC Retained and Administered
- 9 sites: PHMC Partnered Property
- 6 sites: Placed Property Program
- 22 sites: Transferred to Local Ownership
- 5 sites: Transferred to Federal Govt./ Other State Agency Ownership
- 5 sites: Leased to County/ Township

Using the timeline as a foothold for methodology selection, seven sites were selected based on the overlapping sites present in both studies and being placed outside of PHMC's administration and operation as of 2019.⁶ The seven sites were then compared to determine overlapping instances of rankings and final placement. Four sites were omitted, as it was determined these sites had overlapping factors found in the other sites based on current placements and previous ranking.⁷ The following three sites have been selected to investigate further in this thesis, as being broadly representative of a deaccessioning approach:

⁶ There are twenty seven sites evaluated in the 1997 study. However, four sites were paired during the 1997 evaluation and shared the same ranking. This occurrence was due to the committee not being able to distinguish key differences within the paired sites that would warrant their own ranking above or below. (Two sites – Ranked 3rd / two sites – ranked 5th)

⁷ PHMC, "Preliminary Rankings Blue Ribbon Committee." Unpublished, 1997.

Washington Crossing

- Transferred to DCNR
- 1997 Blue Ribbon Ranking: 5/25
- 1981 Blue Ribbon Ranking: Less Important

Daniel Boone Homestead

- Partnered Property
- 1997 Blue Ribbon Ranking: 19/25
- 1997 Blue Ribbon Ranking: Less Important

Morton Homestead

- 99 year Lease with Borough
- 1997 Blue Ribbon Ranking: 24/25
- 1997 Blue Ribbon Ranking: Most Important

One additional site has been included here, which is currently operated and administered by PHMC, the PA Military Museum. Despite its low ranking in both studies, the PA Military Museum's current position makes it worth discussing why this site was kept in light of other sites deemed more important and having been deaccessioned.

PA Military Museum

- Retained by PHMC
- 1997 Blue Ribbon Ranking: 23/25
- 1997 Blue Ribbon Ranking: Less Important

Once the four case studies sites had been identified, the Blue Ribbon Reports and newspapers and other sources were checked for mention of the site or date of ranking released. With this site-specific data compiled, interviews were conducted with the current site holders to gauge their perspective of their site's response to the Reports and its current status. (Chapter 4/Appendix A) This information was then synthesized to summarize and evaluate four broad avenues of deaccession by PHMC. The evaluations, along with site responses, help to determine which deaccession result was the most, less, and least successful in determining and reaching the "best and highest"⁸ use for historic sites under PHMC.

⁸ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981. 5.

Chapter 2

Accession and Deaccession

The conversation revolving around accession and deaccession is dense, as the topics covers various fields, typology of artifacts, historic sites, and cultural heritage. The dynamic relationship between accession and deaccession is as complicated as the entities in which they are stored. Although the terms "accession" and "deaccession" are typically applied to artifacts in collections, they also can apply to historic sites themselves. As a fundamental part of the preservation field, it is necessary to analyze and evaluate the associated processes and outcomes – the facts as well as the misconceptions.

The public is the presumed beneficiary of historic sites. The public stands as an assembler, donator, and observer to the accession of artifacts and historic sites and their artifacts. The public is often an active participant through the donation of items or even sites. When an artifact is transferred to and held by an institution, a museum, its status is misconceived by the public as being eternally secure. This point is driven home by the analogy used in the 1997 *A Deaccession Reader* that the museum is a "permanent repository, a great barrel of amber in which things – once dropped will be forever preserved."⁹ The nature of accession presumed by the public can cause intense strain on museums to maintain extensive collections, regardless of whether they are actually displayed. Those who participate in deaccession do so as a necessary evil that will be used for collection enhancement, giving up one item for another, but attempting to do so

⁹ Weil, Stephen E. 1997. *A deaccession reader*. Washington, DC: American Association of Museums. 3.

“according to the museum best practices and codes of ethics as dictated by the American Alliance of Museums.”¹⁰ This act can easily be misperceived by the general public as going towards operational costs if transparency about where the funds are being spent are not clearly shown. As a result of the presumed indefinite duration and high level of preservation, members of the public respond in voices of anger, betrayal, and disgust at notions of deaccession to any combination of a state entity to entity, state to a municipality, or public/private sale. Lack of clarity on behalf of the deaccessor, especially when a public entity causes a rift to form, or when the public is obscured from a clear understanding of what will be happening to the deaccessed object.

Deaccession, as viewed by the public, presents an ethical issue regarding ownership and trust in terms of what an institution has vowed to uphold versus the retained ownership the public has expected. This issue is more contentious in instances like PHMC, funded largely by public funds pooled from taxes, and supplemented by charitable donations. However, neither side was ever completely aware of the parameters involved in the stewardship of cultural heritage sites and artifacts. The "testy"¹¹ response to deaccession by the public has been the focal point of many studies and controversies over the last century, most intensely during the late 1990s into the early 2000s as institutions throughout the United States found themselves faced with tough budgetary decisions.

¹⁰ PHMC, “Thesis Review Comments,” email message to author, August 19, 2020.

¹¹ Stephen E. Weil and Steven H Miller, “Selling Items from Museum Collections,” in *A Deaccession Reader*.51-61.

The deaccessioning of objects from collections is by no means a new occurrence. Deaccession has been a process within museums since the popularization of natural history and art museums since the end of the 19th century. The practice of deaccession came under criticism with perhaps the earliest example of public objection to deaccessioning, at least as the practice then occurred, when it was found out that in 1972 paintings were being privately sold by New York's Metropolitan Museum (Met) without the consultation with the public, who donated the sold items to the museum initially. Until the publicized Met deaccession in 1972, the public had not been as exposed to the extent that items were sold, for-profit, to different institutions both public and private.¹² Scholars who have investigated the 1972 event observed that crucial mistakes were made, particularly the complete lack of guidelines in place to dictate how deaccession would be conducted, how the funds would be spent, and how the integrity and preservation of the artifact would be assured, even in private ownership.¹³ Before this public controversy it was presumed that a museum was to be a permanent repository for precious items. Deaccession was an unforeseen outcome that exposed how costly curation can be without steady funding sources.

Historic sites present an even more "testy"¹⁴ situation, for not only does a historic site have its own accessed collection of artifacts, it is also the repository for said artifacts and an accessed entity in and of itself. Therefore, historic sites present an additional set

¹² Stephen E. Weil and Donald Garfield, "Deaccessioning Goes Public," in *A Deaccession Reader*. 11.

¹³ Stephen E. Weil, *A Deaccession Reader*

¹⁴ Stephen E. Weil and Steven H Miller, "Selling Items from Museum Collections," in *A Deaccession Reader*. 51-61.

of ethical and stewardship questions in terms of the validity of deaccession: who is a suitable candidate, the avenues in which a site can legally be sent, and the level of retained involvement from the original site owner, if any.

This study aims to understand the factors that lead to the various avenues of historic site deaccession but will only briefly review the outcomes for their artifacts, whether previously deaccessed from the site or housed in different collections. The focus on historic sites stems from the adaptive nature that organizations like PHMC and others with accessed collections have implemented in order to understand the extent of those collections and their Management. Additionally, previous studies such as "Models for Protecting Our Heritage: Alternatives for the Preservation of Public or Non-Profit Owned Historic Resources," by Alexis Haight Shutt (1991)¹⁵ and "Founding or Funding: Are Historic House Museums in Trouble?" by Dina Kanawati (2006)¹⁶ provide in-depth investigations, specifically of the Management of historic sites and their collections. Both scholars examined the need for further decisions and reinterpretations of guidelines regarding the deaccession of sites and collections in order to ensure the survival of historic house museums.

¹⁵ Shutt, Alexis Haight. "Models for Protecting Our Heritage: Alternatives for the Preservation of Public or Non-Profit Owned Historic Resources." ScholarlyCommons. University of Pennsylvania, 1991. https://repository.upenn.edu/hp_theses/411/.

¹⁶ Kanawati, Dina. "Founding or Funding: Are Historic House Museums in Trouble?" ScholarlyCommons. University of Pennsylvania, 2006. https://repository.upenn.edu/hp_theses/9/.

Pennsylvania Site Acquisition 1910-1970

Understanding the PHMC's commitment to acquire and maintain historic properties, and the path to their deaccession, requires an overview discussion of the creation of PHMC,

In 1901 the Commonwealth made its first attempt at documenting the history of Pennsylvania through the creation of county historical societies. However, by the 1910s, it had become clear that the financial burden required of these poorly funded historic societies was too great. In a formal response to lightening the pressure on individual counties, the Commonwealth's General Assembly enacted on July 25, 1913 (P. L. 1265, No. 777), which created the Pennsylvania Historical Commission (PHC).¹⁷ Initially, the annual funding for PHC was appropriated at \$40,000, but was reduced to \$10,000 upon enactment due to funding cuts, which created difficulties for the organization to be immediately "property minded."¹⁸ As a result, PHC focused its initial efforts on Heritage Plaques and archaeology until the fifth generation of the Commission in 1929. By drawing on political support, PHC was finally able to acquire its first historic site and establish its duty to acquire and protect Pennsylvania history, with the acquisitions of Old Economy Village and Fort Augusta in 1929. ¹⁹

¹⁷ P. L. 1265, No. 777, *Act of July 25, 1913*. General Assembly of Pennsylvania Cong. (1913) (enacted)

¹⁸ Nichols, Roy F. *The Pennsylvania Historical and Museum Commission; a History*. Harrisburg: Pennsylvania Historical and Museum Commission, 1967. Pg 13
Roy F. Nichols, previous professor at the University of Pennsylvania (1921-1966) and member of the Pennsylvania Historical Commission (1940-1943) wrote a book about the comprehensive history of PHMC from 1820 to 1963 (date of print). This book should be consulted regarding the rest of PHMC's history as well as related publications and a list of generations of Commission members since 1913.

¹⁹ These two historic sites acquired would be obtained due to an inability of the local historical society to fund or staff the sites adequately.

The Great Depression of 1929 inevitably halted the already small amount of funding for site acquisition due to state and nationwide budget cuts.²⁰ Through the New Deal Act in 1936, PHC became responsible for securing additional funding for a PHC Headquarters as well as hiring enough staff to participate in the National Historical Records Survey.²¹ However, PHC's demands for site funding, an increase of staffing, and other related growing responsibilities as the organization expanded again constrained its operations. The combined administrative requirements for approval by the bureaucracy of the Department of Instruction, which, in turn, reported to the Governor resulted in an overall lengthy approval process.

In 1945, PHC, along with the State Museum and Archives, would become PHMC, working as one entity reporting directly to the Governor of Pennsylvania. As a result of this merger, PHMC streamlined its processes to secure proper funding, site furnishing, repairs, staffing, and educational programming at its historical sites.

A Call to Action presented by PHMC in 1957 stressed the need to acquire sites in order to present the Commonwealth's "magnificent heritage in a more meaningful way, and to a larger audience, [...]to make our people and the nation aware of the proud inspiring story of Pennsylvania."²² An important criteria for site acquisition by PHMC was to locate a site in each county of Pennsylvania, which would, in turn, secure state funding; this plan was never fully accomplished, with the fifty-seven sites clustered in forty of the

²⁰ PHC during this time would stop meeting due to most of the funding being used for a William Penn Commemoration rather than general operations being ruled "unconstitutional."

²¹ Nichols, Roy F. *The Pennsylvania Historical and Museum Commission*. Pg.21.

²² Nichols, Roy F. *The Pennsylvania Historical and Museum Commission* , 42.

Commonwealth's sixty counties by 1997.²³ In order to maintain constituent support, the *Call to Action* urged more significant political figures in the Commonwealth to show an effort to retain their valued historic sites and protect the "historical riches Pennsylvania offers."²⁴ However, Commission funding realistically could not be guaranteed, even with overwhelming public support, which would ultimately be shown by the substantial reduction in the number of sites by the organization over the next thirty years.

In their infancy, historical societies of the early 20th century, PHC included, had neither sufficient community support nor the financial backing to maintain the multiple buildings and collections that many do today.²⁵ Through the 1950s and the next thirty years, the Commonwealth of Pennsylvania passed additional acts that allowed for gifted donations to PHMC from other organizations and institutions that brought fifty-seven properties (multiple sites per county, but not one per each county) under their management by 1981. A notable phase of acquisition occurred with Project 70, the Land Acquisition and Borrowing Act, passed in 1964 by the General Assembly of the Commonwealth of Pennsylvania. Project 70 was voted in by citizens who allowed for \$70,000,000 of debt to be accrued by the Commonwealth for the "acquisition of lands for recreation, conservation, and historical purpose before such land [is] lost forever."²⁶ The passing of this act, created as a tool against suburban sprawl in growing counties, brought an additional nine sites under PHMC ownership and operations from 1965 to 1971. Many

²³ PHMC, "Blue Ribbon Report and Committee," interview by author, December 2019.

²⁴ Nichols, Roy F. *The Pennsylvania Historical and Museum Commission*; 42.

²⁵ Nichols, Roy F. *The Pennsylvania Historical and Museum Commission*.

²⁶ Project 70 Land Acquisition and Borrowing Act, act of June 22, 1964 (Sp.Ses., P.L. 131, No. 8), 72 P.S. §§ 3946.1-3946.22., Section 2.4.

states would not receive such funding for site preservation until the passing of the National Historical and Preservation Act (NHPA) of 1966. NHPA allowed for the implementation of Section 106 review through State Historic Preservation Offices (SHPO) to slow or otherwise mitigate the adverse effects of federal projects on properties on or eligible for the National Register. In turn, it was providing preservation and modest but important funding to the state level through the Historic Preservation Fund. The Commonwealth of Pennsylvania in 1981 would intertwine PHMC and the SHPO by enacting *Title 37: Historical And Museums Historic Code*, to clearly define the responsibilities of each organization; this played a role in supporting avenues of deaccession for other institutions that were in compliance with PA Title 37.²⁷

PHMC Deacquisition 1981 to 1997

By the start of 1980, after the consolidation of the Department of Environmental Resources (DER) and the Bicentennial, PHMC owned, operated, managed, and staffed fifty-seven historic sites throughout Pennsylvania. Despite the prosperity of the previous sixty years, PHMC decided to internally review the sites that it had acquired during that time, setting the course for a deaccession process that would play out over the next forty years. PHMC presented its decision as the result of a strong motivation to refine and

²⁷ Title 37, Pennsylvania History and Museum Code. 1970. Retrieved July 25, 2020, from <https://www.legis.state.pa.us/cfdocs/legis/LI/consCheck.cfm?txtType=HTM>, Nov. 25, 1970, P.L.707, No.230.

reestablish the mission of preserving Pennsylvania's Heritage to increase annual visitation to the Commonwealth's many historic sites.²⁸

To commence the considerations for deaccessioning, a mandate was proposed and approved in 1981 to create the first Blue Ribbon Report that would be headed by PHMC staff and outside consultants internally selected by PHMC.²⁹ As expressed by PHMC Staff Michael Ripton during a Blue Ribbon Report committee meeting, the process reflected the reality that the Commission needed "to quit trying to do so much that is mediocre,"³⁰ at their historic sites in terms of spreading a small amount of funds to a large number of sites. Those partaking in the Blue Ribbon Report undertook this project as a foundational challenge to find the "highest and best use"³¹ for all fifty-seven sites considering the Commission's resources. The Blue Ribbon Report honed in on three components of a site: "historical significance, historical integrity, and historical interpretation."³² The Report aimed to have an even number of sites in each category so as not to overwhelm any particular category, which resulted in a relatively even split of:

(Appendix B)

²⁸ PHMC, "The Property Evaluation and Placement Program of the PHMC," Unpublished, November 5, 1981.

²⁹ 1981: PHMC- Peter Welsh, Michael Ripton, Frank Schmidt, David Salay, Thomas McCarthy, and John Trussell. Professional- Edward Alexander, Douglas Dolan, John Frantz, William Murtagh, William Tribble, James Biddle, and Emery Wimbish.

³⁰ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981. 5.

³¹ PHMC, "Blue Ribbon Report." Unpublished, November 5, 1981. 3.

³² PHMC, "Blue Ribbon Report." Unpublished, November 5, 1981. 4.

- Most Important – 22 sites, 39%
- Less Important – 15 sites, 27%
- Least Important – 20 sites, 34%

The independent development of these evaluation criteria by the task force of PHMC required the defining of each category and criteria, such as: how is historical significance defined and evaluated? Can one factor be more important than another? PHMC did not utilize or incorporate any federal or regional methodologies that might have existed at the time to address deaccession. This moment of weighing the integrity, significance, and interpretation of each site is pivotal because it defines how PHMC viewed and attempted to broadly quantify the potential future qualitative historical value of a site through the 21st century, which previously had not been done by a state level institution. This evaluation and ranking, despite its inherent degree of subjectivity, was necessary given the process' end goal of identifying the sites for potential deaccessioning and doing so in a replicable way. The 1981 Blue Ribbon's process and implementation was viewed favorably by PHMC's John C. Wesley and Robert N. Sieber in 1995 "The Highest and Best Use!" 1981 Report recap, praising it for being a, "revolutionary initiative [that] marked the beginning of a very successful approach to the management of historic sites and museums,"³³ and whose Placed Property and Leasing program has been met with heavy "inquiry from other states" and discussed at conferences.³⁴

³³ PHMC, Wesley, John C., and Robert N. Seiber. "The Highest and Best Use!", The Historical and Museum Commission's Placed Property and Leasing Program." Unpublished, December 6, 1995. 1.

³⁴ PHMC, Wesley, John C., and Robert N. Seiber. "The Highest and Best Use!", 1.

The goal of the 1981 Blue Ribbon Report was to lay the site recommendations and foundations for what would come to be known as the Placed Properties Program. The Program was a subcategory for properties under PHMC management that had ranked less or least important in terms of the three criteria of significance, importance, and integrity. This would lead to the avenues in which properties were staged to be handed over to other organizations to own, operate or manage. This program would create PHMC's first Management Agreement.

The Management Agreement outlines PHMCs "requirements for operation of a historic site/museum by a non-state, non-profit entity,"³⁵ that also incorporates standards from the American Association of Museums (AA), the National Park Service, and the American Association for State and Local History (AASLH).³⁶ The Agreement defines what PHMC is contributing to a site and what is expected of the group, agency, or entity that is being incorporated to "aid and assist the Commission in preserving the historic integrity and interest of the facility."³⁷ The Agreement also requires a written Management Program detailing activities at the site, scheduled maintenance, intended use, written annual budget, and the anticipated cost of the program to be submitted to PHMC. Once this information is submitted, it cannot be changed without consultation with PHMC, but does allow for either party to terminate the Agreement after giving 30 days written notice. Artifacts and documents at the site which are accessed by PHMC

³⁵ PHMC, Wesley, John C., and Robert N. Seiber. "The Highest and Best Use!", 2.

³⁶ PHMC, Wesley, John C., and Robert N. Seiber. "The Highest and Best Use!", 2.

³⁷ PHMC, "Management Agreement PHMC & Juniata County Historical Society," 1999, 2.

belong to PHMC, and the site's new management must sign a Loan Agreement to retain them; these objects can also be recalled at any time after a 30 day written notice is issued. Most importantly, and no matter what type of group is taking the site on and to what extent they are, the Management Agreement clearly states:

The Commission shall: exclusively retain all statutory rights conferred to it by the General Assembly, including, but not limited to the increase in admission fees, control, and management of the site. (PHMC 2019)³⁸

This clause helps dictate the original intent and ownership of the site and the fluid level of changes that PHMC can make to a site they are not fully managing or operating.

Despite the forward-thinking by PHMC to find the best and highest use for each site, the application of the Management Agreement was a drawn-out process as various support groups for sites that could be accessioned had to be identified, examined for organizational and financial capacity, and prepared for the requirements outlined in the Agreement. Additionally, many of these groups did not, in fact, even approve of PHMC wanting to relinquish its sites, perceiving it as a sign that the Commonwealth was "abandoning" ³⁹ its heritage. Such animosity typically was exacerbated by the groups having had advance knowledge that the internalized site ranking was being conducted or how it was conducted. Some sites that disapproved immensely of their ranking were arbitrarily moved to the "best" category, with an accompanying public apology to the

³⁸ PHMC, "Management Agreement PHMC," Template, 2019

³⁹ Laudenslager, B., Letter, Property Review Commission – PHMC, August 25, 1997.

site.⁴⁰ As a result, along with distrust from site support groups, many of PHMC's "Less" and "Least" ranked sites would not begin to transition out of the Commission's management until the start of the 1990s.

Furthermore, an administration change within PHMC during the administration of Governor Ridge in 1995 oriented the "Commission to [re]examine a number of [their] mandates and responsibilities"⁴¹ towards the Placed Property Program and the remaining administered PHMC sites, which at the time was down to twenty-six from the original fifty-seven (one new site was acquired, totaling twenty-seven in 1997).⁴² The mandate, which led to the creation of the Blue Ribbon Committee, was submitted and passed in October of 1996 with the following objective: "the assessment shall determine the relative value of each site's importance in fulfilling the mission of PHMC,"⁴³ and was to be completed no later than August of 1997. Similar to the previous Report, the 1997 Blue Ribbon Committee carefully selected leading professionals and historians within the Commonwealth, along with staff members of PHMC.⁴⁴

From 1996 through 1997, the Blue Ribbon Committee was tasked with evaluating the twenty-seven sites that PHMC had continued to fully manage and operate. Due to the creation of the Placed Property Program, by 1997 the additional thirty-two sites that were

⁴⁰ Woestendiek, J., "State action cools spat over park, Washington Crossing given higher historical rating," *Philadelphia Inquirer*, December 1, 1981, 20.

⁴¹ PHMC, "Blue Ribbon Committee Meeting Minutes." Unpublished, January 24, 1997, 3.

⁴² PHMC, "Blue Ribbon Committee Meeting Minutes." 3. This decision was also supported by the Office of Administration who was performing Organizational Reviews under Governor Ridge.

⁴³ PHMC, Chairman Buchanan. "Motion to Establish a Special Blue Ribbon Committee on Historic Sites," August 21, 1996.

⁴⁴ Names of those involved in the 1997 Blue Ribbon Committee: Vivian Piasecki, Kurt D. Zwikl, David Argall, John F Coleman, John Frantz, Paul Ivory, Peter Tartline, Timothy Buchanan, Brent D. Glass, Nadine Steinmetz, James R. Roebuck, Barbara Franco, Page Putnam Miller and Donna Williams.

evaluated in the 1981 Report were not considered in this 1997 report as they were somewhere in the process of transitioning out of PHMC's full management and operations status. The 1997 site evaluation was based on the site's significance, integrity, themes, audience potential, and community/ support.⁴⁵ These traits were weighed equally, with each evaluator being able to assign only up to five points per category, per site, with a "perfect score being 25."⁴⁶ To inform its work the Committee overseer, Bureau Director for the Bureau of Historic Sites and Museums (BHSM), Donna Williams, provided the Committee with a prepared packet, which provided a profile for each site that contained information regarding:

[the] mission statement, operating budget, staff complement, annual visitation, property size, number of structures, number and scope of collections, associate information, interpretive programs, [and] community support. (PHMC 1997)⁴⁷

Additionally, members of the 1997 Committee visited and engaged with the current administration of the sites to better understand how to rank the site within the five criteria.

The desired outcome of these findings would be to find the highest and best use, again, for PHMC's fully twenty-seven fully administered sites; again, the other thirty-five properties by this point had been categorized as a Placed Property, awaiting a deaccession avenue. Making a further cut would allow for PHMC to focus on the improvement of a dozen or so sites, providing them with full staffing and investing

⁴⁵ PHMC, "Blue Ribbon Committee Meeting Minutes." January 24, 1997. Ms. Steinmetz – "Historic Significance, Historic Integrity, and Historical Interpretation/Themes are pretty much the same as those used when the sites were reviewed in 1981."

⁴⁶ PHMC, "Blue Ribbon Committee Meeting Minutes." February 26, 1997, 5.

⁴⁷ PHMC, "Blue Ribbon Committee Meeting Minutes." July 16, 1997, 5.

resources to draw visitation. Once the Committee finished scoring, the specifics of a site's criteria were able to be discussed concerning a similar site. Questions were also raised for sites that showed a relatively high change from the 1981 ranking to the 1997 ranking. As this was the second Report of this kind conducted by PHMC, the retention of seven sites that were ranked Less or Least in 1981 required the 1997 committee to consider how much potential a museum could have if given proper investment. Of the sites that were evaluated in 1997:

- Most Important: Eighteen sites – 70%
- Less Important: Six sites -23%
- Least Important: One site – 3.5%
- Unranked: One site – 3.5%

(Appendix C)

By comparing the individual scores, a clear division can be seen between the top ranking sites and the lowest ranking ones. There appears to be a significant difference between a site that is provided with no funding ranking extremely low, and a site with a fair amount of funding in terms of audience visitation and community support. However, the subjective nature of this study does show that while site #25 ranked the lowest, members felt the site did hold a potential for a support group and site integrity. (Figure 1)

Sites	Rank	Cost	Significance	Integrity	Themes	Audience	Support	Total
Ephrata Cloister	1	\$416,501	5,5,5,5,4 5,5 [34]	5,5,5,5,5 5,5 [35]	4,5,4,5,3 5,5 [31]	5,5,4,5,3 5,5 [32]	4,5,4,4,4 5,5 [31]	163
Governor Printz Park	25	\$0	4,3,3,2,4 2,1 [19]	4,2,1,2,4 4,1 [18]	3,2,4,2,4 2,1 [18]	3,1,4,1,3 1,1 [14]	5,1,1,1,3 1,1 [13]	82

Figure 1 Segment of the compiled score sheets from the 1997 Blue Ribbon Committee Report that ranked the sites based of five set criteria. This chart shows the variations in individual scores in each category, and the significant point variations between the top ranked site and the lowest ranked site. For additional scores please contact PHMC or the National Archives.

The 1997 Blue Ribbon Committee's report was sent to the subject sites in October of 1997, and, as in the study fifteen years prior, it was received with harsh criticism from the lower-ranked sites and appreciative praise from the higher ones. Also, as in the previous report, no prior information was given regarding the outcome of the sites. Unlike the 1981 report, the 1997 report was implemented internally and therefore the public was generally unaware that such evaluations were being made, thereby adding to the intense reactions to it. The largest hurdle for the public to accept the ranking was trying to rationalize the ranking of state significance versus national significance. Typically, National Significance would be ranked higher than State given that a site has contributed to the growth of the nation on a larger scale versus events clustered within a state. Additionally, there is a level of protection that comes with being placed on the National Register that is commonly misinterpreted by the public as being a permanent safeguard similar to museums as discussed earlier in this chapter. However, the ranking of both reports clearly shows that even sites that are listed on the National Register such as Washington Crossing, Morton Homestead, along with others, are highly ranked on the Register and still be able to be deaccessed.

Most notable was the response from the supporters of Hope Lodge, who accumulated hundreds of signatures to have the site kept under PHMC, with letters of support that highlighted the importance of the site in National and Regional Historical

events. Unfortunately, this plea on behalf of the national importance solidified the recommendations in the Report sites which aimed to retain only sites whose heritage was linked to that of the Commonwealth's. Those sites are now partnered with plans to be leased and transferred.

Chapter 3

Deaccession Avenue Types

The 1997 Blue Ribbon Committee Report provided additional recommendations and placements for the remaining twenty-six sites fully administered and operated by PHMC. The report also included a summary of recommendations for the remaining sites out of the thirty-one previously identified in the 1981 Report (ranked Less/Least Important) and moved to the Placed Properties Program that had yet to be deaccessioned and updates for those that had. As of 1997, only five of the thirty-one Placed Properties had been successfully transferred out of PHMC, with only an additional nine sites in the process of transfer negotiation for a deaccession avenue. This more gradual than expected pace was reflected in the "Mandate Policy Change," which was passed in 1996 with the intent to "effectively eliminate the Placed Properties program within five years from the date."⁴⁸ This mandate further stated that if a property has not been transferred or sold within the mandated five years, it will be considered for private ownership by PHMC; this has yet to happen.⁴⁹ Therefore, it was necessary for PHMC to more intently and rapidly seek out potential management groups who could operate each site.

With that as background, this section is an overview of the sites selected for this thesis, drawing from the set of criteria established in both PHMC's Blue Ribbon Report of 1981 and its Committee of 1997, as well as on their most current status as of 2019. Each

⁴⁸ PHMC, Chairman Buchanan. "Motion to Establish a Special Blue Ribbon Committee on Historic Sites," August 21, 1996.

⁴⁹ PHMC, Chairman Buchanan. "Motion to adopt Placed Properties Program," August 21, 1996.

historic site within PHMC necessitates and involves an interwoven effort amongst Friends groups, funders, visitors, landowners, and management groups to secure the longevity of a historic site, and they often face the same struggles.

For this thesis, the author has identified four basic types of deaccession used by PHMC, based largely on where the property went and how much involvement PHMC retained with the site post-deaccession. Additionally, the types also acknowledge parallels with federal surplus property policy which also transfers, sells, and leases properties. Currently there are no sites that are known to have been deaccessioned to private ownership.

Type 1: Transferred to Another State Government Entity.

- PHMC retains original ownership of the site, but neither invests in nor maintains the property. The new government entity maintains the property as long as it secures the historic nature of the site.
 - Like the National Park Service transfer of surplus property.

Type 2: Leased to Municipality,

- PHMC still owns and maintains the site's structures but does not provide funding, staff, or programming. A municipality takes responsibility for grounds maintenance and use of the property, when approved by PHMC, through a 99-year lease. Legally, by law, PHMC is only able to engage in 99-year leases with other government entities.⁵⁰
 - NPS has a leasing program as part of the Federal Surplus Property Police, which similarly regulates the terms of alterations to the historic structure.

Type 3: Type 3: Partnered Property

- PHMC retains ownership of the site as well as providing financial stability to the site, site staffing, and programming. Friends groups are partnered with PHMC to provide supplemental needed staffing and resources to the site.

Type 4: PHMC retains

- The site remains completely staffed, funded, maintained, operated, and programmed developed by PHMC.

Washington Crossing Historic Park, the Morton Homestead, Daniel Boone Homestead, and the P.A. Military Museum respectively represent these four broad avenue types of deaccession in terms of management status. PHMC's fifty-seven historic

⁵⁰ PHMC, "Thesis Review Comments," email message to author, August 19, 2020.

sites have overlapping factors that have led to their rankings and current standings within the Commonwealth. The nuances and processes applied over time to these four sites establish general parameters to determine factors and significant approaches to deaccession, how they came about, and were addressed, and their relative success.

Type 1: Transferred to Government Entity, DCNR - Washington Crossing

This type represents a property that has identified the highest and best use of a site as the transfer to a supporting Government entity to alleviate if not eliminate complete financial and management obligations on behalf of PHMC.

On Christmas Eve, 1777, George Washington crossed the Delaware River, moving his troops into Trenton, New Jersey. This move by Washington initiated the Battle of Trenton, a “crucial episode in the struggle for independence”⁵¹ during the Revolutionary War. To commemorate this battle and its casualties, the Bowman’s Hill Tower was dedicated in 1918 on-site. This pivotal battle is a significant attribute of the historical significance of what today is known as Washington Crossing Historic Park. The PHMC portion of the overall site is a large State park made up of 500 acres in Delaware County, Pennsylvania, that spans across different historical periods, from the Revolutionary Era through the 19th century.⁵² An additional 300 acres is located across the Delaware River in New Jersey, where George Washington landed before the Battle of Trenton. Together these two shores of Washington Crossing were nominated by the State of New Jersey in

⁵¹ National Historic Landmark Nomination Form, “Washington Crossing New Jersey and Pennsylvania,” August 1, 1960.

⁵² Washington Crossing Historic Park. Accessed July 7, 2020. <https://www.washingtoncrossingpark.org/>.

1961 as a National Historic Landmark (NHL) and approved. The NHL was automatically registered on the National Historic Register with the passing of the National Historic Preservation Act.⁵³ Despite being part of the NHL both parks operate separately from each other, with PHMC only having authority over the Park of Washington Crossing located in Pennsylvania and the New Jersey State Historic Preservation Office (SHPO) overseeing their own Park.

Washington Crossing Historical Park is also home to nearly a dozen restored structures over its 500 acres that are clustered in two ends of its Park. The areas in the Upper park make up Taylorsville Village, which is a large part of the site around the historic Ferry House and Mill, where generations of the Taylor family built their dwellings, markets, and Inn through the late 1800s. The other park of the Park is home to the Thompson-Neely Mill House, in which "grain was ground for the American army"⁵⁴ during its encampment at Washington Crossing.

The Pennsylvania side of Washington Crossing, 500 acres, was transferred to PHMC in 1971 with the passing of Act No. 275 by Pennsylvania on December 3, 1970.⁵⁵ The Act consolidated the Department of Forest and Water (DFW), along with other state-run agencies that managed natural resources, into the Department of Environmental Resources (DER).⁵⁶ The newly formed DER transferred three of its sites in 1971 that were

⁵³ NHL Form, "Washington Crossing New Jersey and Pennsylvania." August 1, 1960, #66000650.

⁵⁴ NHL Form, "Washington Crossing New Jersey and Pennsylvania." August 1, 1960, #66000650.

⁵⁵ Osborne, Peter. No Spot in This Far Land Is More Immortalized: A History of Pennsylvania's Washington Crossing Historic Park. Yardley, PA: Yardley Press, 1994.

⁵⁶ Osborne, Peter. No Spot in This Far Land Is More Immortalized: A History of Pennsylvania's Washington Crossing Historic Park. Yardley, PA: Yardley Press, 1994.

viewed as "important historical site[s] containing some recreational facilities" between PHMC and the National Park Service.⁵⁷ The transfer to PHMC triggered a multitude of confrontations with the long-standing Washington Crossing Park Foundation (WCPF) and the newly created Park Commission, which had been seamlessly working with DFW for the past fifty years. This strife was evident in the planning for The Bicentennial of the United States, when the WCPF was denied participation in planning and was systematically taken out of leadership as PHMC took over. PHMC's subsequently did incorporate the Washington Crossing Park Associates Group (WCP Associates) in 1993, in attempts to find alternative supports from the unstable site.

When the Blue Ribbon Committee ranked Washington Crossing as "Less Important" in its Report in 1981, the ranking brought another wave of tension between the three groups. The ranking was primarily based on the fact that amongst the standing structures at the Park, only "two of the buildings were there in 1776" and recommended that the site would be more suitable fully "under the auspices of the [PHMC]."⁵⁸ The PHMC Report was also highly critical of Taylorville Village, which makes up a bulk of the existing structures on the site. The Committee felt the "state should [not] be maintaining something that has nothing to do with what the site commemorates,"⁵⁹ despite the observation in the National Historic Landmark that the site was imperative to understanding the site's role during the Revolutionary War.

⁵⁷ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981, 9.

⁵⁸ PHMC, "Blue Ribbon Report." Unpublished, October 14, 1981, 2.

⁵⁹ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981, 9.

In 1996 an audit was conducted by the Commonwealth's Office of the Budget at the Washington Crossing site, which analyzed the Management Agreement between the Park's Foundation and PHMC. The in place Agreement did not "reflect current standards, needs or events in the park,"⁶⁰ and it was felt that the relationship between the two parties "had in some ways become an informal one."⁶¹ The audit identified the following four main issues:

1. The W.C Foundation was using funds raised by the park for non-park sponsored scholarships rather than reinvesting into the park's programs and projects and had done so without written approval from PHMC.
2. "The failure of the Foundation and PHMC to abide by the terms of their original operating agreement.
3. Lack of certain controls within the foundation's operations,
4. The potential conflict of interest created by members of the Foundation serving on the Park Commission".⁶²

The audit report stressed the need for PHMC and the Foundation to clearly define who owned what in the collection, as it was currently unclear, especially regarding the painting of George Washington Crossing the Delaware. The pressure from the audit, as put by author Peter Osborn in his book detailing the history of Washington Crossing, was a trigger that set off "a series of events that would culminate in a lawsuit, court injunction

⁶⁰ Osborne, Peter. No Spot in This Far Land Is More Immortalized, 431

⁶¹ Osborne, Peter. No Spot in This Far Land Is More Immortalized, 431

⁶² Osborne, Peter. No Spot in This Far Land Is More Immortalized, 430

and then a settlement between the Foundation and the PHMC later in 1997.”⁶³ The disintegration of the relationship between these two groups is complex and provides a strong example of an item that has been loaned not having clear ownership, as discussed in Chapter 2.⁶⁴ Ultimately, the Foundation removed itself from the Park, and the Washington Park Commission put in place by DFW was swiftly eliminated in 1998 by a bill passed by the Pennsylvania House and Senate which repealed the Sections of the PA Title 37 Historic Code which allowed commissions to have “power and duty” at the Commonwealth’s PHMC sites.

As relations between WPC Associates Group of Washington Crossing Historic Park and PHMC further broke down entering the early 2000s, PHMC's attention was spent finding a suitable steward to take over management, operation, and the financial support of the site. As PHMC itself was hit with decade after decade of budget cuts, the site itself was functioning at less than half of what it was when evaluated in 1997. From PHMC's perspective, the site's mission was "more of a nature mission, than a history"⁶⁵ one since the Park was two historic locations separated by 500 acres of wooded area. Whether it was the Friends group feeling strained under PHMC or the upcoming budget cuts, in July of 2013 “a paragraph was placed in the Commonwealth’s budget act that required PHMC and DCNR to enter an agreement”,⁶⁶ for the park. The legislation was successful and Washington Crossing Historic Park transferred to the Department of Conservation and

⁶³ Osborne, Peter. No Spot in This Far Land Is More Immortalized, Pg 432, endnote 286

⁶⁴ For more information regarding this controversy please read Peter Osborn’s No Spot in this Far Land [...], Chapter 7: The Bicentennial and Beyond, “*An Ugly Divorce*,” Page 429 – 436.

⁶⁵ PHMC, “Blue Ribbon Report and Committee Specific Sites,” interview by author, June 2020.

⁶⁶ Osborne, Peter. No Spot in This Far Land Is More Immortalized, 601.

Natural Resources (DCNR) (previously DER) in 2016. As a result, DCNR currently has "administrative and management control"⁶⁷ of the site and has since staffed, reopened, and invested in capital projects for the site. The Friends group has been given more liberties by DCNR to conduct programming and funding events that allow them to reinvest into the Park without being tied to protocols seen in other transition types.

This typology, despite its sometimes turbulent interactions among the parties, is ultimately is an example of a successful transition from one Government entity to another, and how ensuring a proper deaccession avenue to an entity that has a large funding stream and support can bolster a site.

Type 2: Transferred to Municipality - Morton Homestead

This type represents a property that was leased to a supporting group to alleviate complete financial and management obligations on behalf of PHMC, but no best use has been identified for the site.

Constructed in 1654, the Morton Homestead is considered to be one of the oldest log structures in Pennsylvania. Located near the bank of the Delaware River, in Prospect Park, Delaware County, Pennsylvania, the structure serves as "an illustration of the way of life of the early settlers on the Delaware [River]."⁶⁸ The Homestead also presents rare evidence of Swedish and Finnish settlers who were once part of New Sweden, which only existed for a short time before the Dutch overtook it in 1655 after winning the Second

⁶⁷ DCNR, Zimmerman, J., "Washington Crossing Deaccession by PHMC," interview by author, June 2020.

⁶⁸ National Register of Historic Places, Morton Homestead, Prospect Park Borough, Chester County, National Register #70000546, 1970.

Northern War. Politically, the Homestead is believed to be "the birthplace of John Morton, a signer of the Declaration of Independence."⁶⁹ The three-sectioned log cabin style house⁷⁰ is one of the few architectural representations of the Swedish heritage that dominated the area in the 17th century. Morton Homestead's architectural and political significance made it suitable for recommendation by PHMC to be added to the National Register, which happened in 1970.

The property was sold during the 18th century, ultimately becoming the Old Ferry Inn, but was closed in 1845 due to the "unruliness of its patrons."⁷¹ By 1854, the abandonment of Morton Homestead prompted action from a concerned citizen, Bessie Ward Hinkson, who "realized its historical importance and obtained a court order to prevent it[s]" destruction.⁷² Once repaired, "the house was lived in by a succession of tenants," which ensured the site's maintenance and security.⁷³

PHMC took over ownership and management of the site in 1935. PHMC's history-focused mission greatly aided the repairs and restoration of the Homestead. PHMC also removed the modern cabin additions and late 19th and 20th-century structures on the property as they did not pertain to the site's narrative.⁷⁴ Interpretation of the site was

⁶⁹ National Register of Historic Places, Morton Homestead, #70000546, 1970.

⁷⁰ National Register of Historic Places, Morton Homestead, #70000546, 1970. Original structure: two separate cabins, that were connected in the middle with a three-stone house

⁷¹ Wallerstein, Gerry, "The Morton Homestead – Oldest Structure in State."

⁷² Wallerstein, Gerry, "The Morton Homestead – Oldest Structure in State."

⁷³ Jablow, Martha, "Don't Miss Landmark Older than Nation," *Philadelphia Inquirer*, November 23, 1975.

⁷⁴ O'Connell, Patrick. "PHMC Deaccession: Morton Homestead." interview by author, June 27, 2020. These previous structures were also used to house the site's caretaker.

bolstered under PHMC's ownership, especially after PHMC reopened the site in 1936 with period furnishings in the Homestead and a newly constructed visitor center.

The 1981 Blue-Ribbon Report ranked the site as 'Most Important,' citing the Swedish heritage and that the structure is "one of the oldest buildings in Pennsylvania."⁷⁵ There was no apparent strife between the PHMC and the site's supporting groups during the approximately additional fifteen years that PHMC solely retained the site and due to the high ranking no proposed plans for deaccession. However, throughout this period, the Homestead did face a steady decrease in the number of open days of operations, access to the building, and access to the collection on-site. Evidence indicates that the site's shift to limited interpretation and on-site staffing was a direct result of budget cuts passed in 1997, which started the search for "alternative management" at the Morton Homestead.⁷⁶ Unlike Type 1: Transition to a Government Entity, this Type grew out of the perceived abandonment of the site as PHMC withdrew their collections, removed staff, and minimized interactions with the site in order to stave off costs being accrued by the site.⁷⁷

When initially seeking a group to take over the property, the Prospect Park Historical Society expressed interest in retaining the property for themselves. PHMC met with the Historical Society, and "decided to do a 99-year lease,"⁷⁸ through the terms of which the Society would have fully opened the site once again, with tours to the public.

⁷⁵ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981, 2.

⁷⁶ PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 2.

⁷⁷ O'Connell, Patrick. "PHMC Deaccession: Morton Homestead." interview by author, June 27, 2020.

⁷⁸ PHMC, "Blue Ribbon Report and Committee Specific Sites," interview by author, June 2020.

By leasing the property, PHMC would have still retained and maintained the historic structure but would not provide staff or create programming for the site. However, despite their expressed interest, the Historical Society was denied a lease by PHMC after a year of financial investigation.

Substantial consideration was then given to the Swedish American Society by the Blue Ribbon Report and Committee, which even until 2013 expressed interest in the site.⁷⁹ However, the Society acknowledged funding problems and lack of organizational strength, preventing PHMC from partnering with them.⁸⁰ Ultimately Prospect Park Borough signed the 99-year lease due to the dissolving of the Historical Society of Prospect Park and is now "maintaining the outside,"⁸¹ as the details of its lease with PHMC prevents independent alterations to the Homestead.

This typology is representative of PHMC finding a suitable alternative to a site in which the historic features are unable to be properly funded and supported to a degree sufficient to open it up for visitation. As a result, the deaccessions's receiver group has found alternative uses for the grounds of the site to bring visitation without utilizing the structure.

⁷⁹ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981.

Swedish society expressed interest in the site, however the state was not legally allowed to sell the property. A counter proposal was investigated in which the Homestead would be moved from its location upstream to Governor Printz Park to tell a unified narrative of Swedish Heritage in the area. Due to the cost of transporting the structure the plan was withdrawn.

⁸⁰ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981, 7.

⁸¹ O'Connell, Patrick. "PHMC Deaccession: Morton Homestead." interview by author, June 27, 2020.

Type 3: Partnered Property- Daniel Boone Homestead

This type represents a property that was partnered with a supporting group to alleviate partial financial and management obligations on behalf of PHMC.

The Frontiersmen of America, Daniel Boone, was born in Pennsylvania in 1734 in the log cabin his father Squire Boone built on his 250-acre land grant.⁸² The Boone family stayed on the property until 1750, when they moved south with the expansion of the southern territories, selling off the property. Owners over the next 150 years added additions to the structure that reflected "typical Oley Valley farmhouses and show[ed] evidence of both English and German architectural influences."⁸³ The site was abandoned for a short time from 1919 to 1926 before being purchased by Rev. Arthur Vossler. The Reverend, desiring to preserve the site, sold the property to PHMC in 1937.⁸⁴ Similar to the Morton Homestead, once under PHMC's ownership, the organization immediately "began [the] restoration of the present structure."⁸⁵ Over the next thirty years, PHMC supported the site with staff and interpretation, and, surprisingly, continued to bring additional structures to the site that reflected the 1700s lifestyle.

The most notable such acquisition and relocation was that of the Bertolet Cabin and outbuildings. Initially built in 1735, Bertolet Cabin was moved a short distance to the

⁸² Pendleton, Philip E., and Philip E. Pendleton, *Oley Valley Heritage: The Colonial Years, 1700-1775*. Birdsboro, PA: Pennsylvania German Society, v.28. 1994.

⁸³ "Visit Us." Daniel Boone Homestead. Accessed July 7, 2020.

<https://web.archive.org/web/20180409155326/danielboonehomestead.org:80/visit-us.html>.

⁸⁴ "Daniel Boone Homestead." Wikipedia, the Free Encyclopedia. Last modified February 19, 2007. https://en.wikipedia.org/wiki/Daniel_Boone_Homestead.

⁸⁵ National Register of Historic Places, Boone, Daniel, Homestead Site and Bertolet Cabin, Birdsboro, Berks County, National Register #71994686, 1972.

Homestead's location in 1968 as its current location was being threatened by quarry activity.⁸⁶ While not original to the site, the Cabin's largely unaltered fabric ensured the preservation of a "rapidly disappearing type of rural architecture."⁸⁷ Since the site was the birthplace of a great American Hero and a hub of historic structures (many admittedly not original to the site), the Daniel Boone Homestead was placed on the National Register of Historic Places in 1972.

In 1981 the Blue-Ribbon Report gave the Daniel Boone Homestead a "Less Important" evaluation. Blue Ribbon Committee members felt that under the current direction, the interpretation of the site and structures has "very little to do with [Daniel] Boone,"⁸⁸ whose history stretched outside Pennsylvania. Efforts were made by PHMC over the next decade to follow through on their recommendations to develop the education elements that provided "interpretation of the homestead itself."⁸⁹ The 1997 Blue Ribbon Committee evaluation of the site placed it as the 19th lowest site out of the twenty-six still held by PHMC. A consensus on the placement was reached by observing that the evidence of Daniel Boone at the site still was not substantial enough to warrant the entire site's focus. Instead, the Boone narrative should be a "subset" at the site which "interprets 1780s life."⁹⁰ PHMC, in the ensuing years, focused on collaboration with the Community and heritage groups for interpretation of the site's Oley Valley narrative.⁹¹

⁸⁶ NRHP, Boone, Daniel, Homestead Site and Bertolet Cabin, #71994686, 1972.

⁸⁷ NRHP, Boone, Daniel, Homestead Site and Bertolet Cabin, #71994686, 1972.

⁸⁸ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981, 8.

⁸⁹ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981, 8.

⁹⁰ PHMC, "Blue Ribbon Committee Meeting Minutes." Unpublished, April 7, 1997, 2.

⁹¹ PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 2.

Despite being a low ranking site and in the Placed Properties Program since 1981, the Daniel Boone Homestead received a revised directive that did not immediately call for deaccession, unlike the other Less and Least Placed Properties sites which did. The Blue Ribbon Committee's Report in 1997 recommended that PHMC retain the site with adjusted hours and "engage [with] the associates, community groups and the Schuylkill Heritage Corridor in a planning process to develop a shared vision"⁹² for the Daniel Boone Homestead. The Homestead became a partnered property during this time due to the Friends of Daniel Boone, which was strong in community support at the time, taking the lead on investing and maintaining the property. The placement of site administration within a Friends group is also due to the nature of Boone's lack of statewide significance, "which is part of the reason why they were chosen to become a partner property."⁹³ Documentation in 2009 by PHMC suggests that this site remains largely underdeveloped, and little has been accomplished in terms of the goals set out in 1997 due to the size and overall "revenue restrictions"⁹⁴ on both PHMC and the Friends Group.

This typology has proved to be less than successful with its ability to find the best and highest use for the site but would not be considered a failure due to the current open status of the site and some continual funding as a partnered property. PHMC was able to find a temporary solution to relieve some fiscal responsibility to the site, while still being able to support its staffing and programming.

⁹² PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 3.

⁹³ PHMC, "Blue Ribbon Report and Committee Specific Sites," interview by author, June 2020.

⁹⁴ PHMC, "Planning our Future: Sustainability Committee Final Report", March 4, 2009, 42.

Type 4: PHMC Management and Operation- P.A. Military Museum

This type represents a property that was retained by PHMC as no supporting group was identified to alleviate complete financial and management obligations but showed growth.

In 1969 the Commonwealth of Pennsylvania opened the doors to its first statewide museum commemorating those Pennsylvanians who participated in, "the Revolution[ary] War of 1812, [the] war with Mexico, [the] War of the Rebellion, [the] War with Spain[,] and World War II."⁹⁵ This first memorialization use for the land that is the current site of the Military Museum was put forth in the 1930s by Theodore Davis Boal, who, during World War 1, "established a privately funded machine gun company on his land,"⁹⁶ to honor his workers who fought in the war. The opening of the Military Museum in May 1969 followed the opening in 1964 of the new State Museum and Archives in the state's capital in order to unify and adequately store the vast collections.⁹⁷

The Blue-Ribbon Reports consistently ranked the Military Museum very low in terms of importance across the board. They felt the museum's mission "should be expanded to include all facets of the P.A. Military Museum."⁹⁸ This recommendation of military history was implemented but created tension between the State Museum and Military Museum, which during this time was also interpreting the military in Pennsylvania's history. As the Pennsylvania Military Museum had expanded its collection

⁹⁵ Miller, Ralph, "Military Museum to Open Today," Pittsburgh Press, May 25, 1969.

⁹⁶ Pennsylvania Military Museum. Accessed July 7, 2020. <https://www.pamilmuseum.org/>.

⁹⁷ PHMC, The State Museum of Pennsylvania. Accessed July 9, 2020. <http://statemuseumpa.org/about/>.

⁹⁸ PHMC, "Blue Ribbon Report." Unpublished, October 14, 1981, 2.

to encompass parts of the State Museum's collection, the 1997 Blue Ribbon Committee recommended that the Military Museum "appoint a committee to define the role and mission of the Museum and Memorial in relation to other PHMC programs, including the State Museum, [and] programs of the Department of Military Affairs."⁹⁹

In 1981, during the first Blue Ribbon Report, the Military Museum had only been in operation for over twenty years. The museum's "less" ranking was based on the site being "seen much more as the National Guard Museum,"¹⁰⁰ rather than a statewide interpretation of the military in Pennsylvania, due to its permanent and dated displays. The site was recommended for deaccession as its collection and narrative was duplicated in other, more stable, museums in the state. By the 1981 ranking "tension between the Pennsylvania Military Museum and the State Museum about who collects what, in terms of military history"¹⁰¹ had grown, and deaccession was viewed as the most reasonable solution. The report felt that given the site's "very low attendance"¹⁰² the Museum could be merged with the State Museum or to be transferred to the Department of Military Affairs.¹⁰³

However, despite the open options to deaccess the Museum, it was recommended that it "be kept under complete PHMC operation in order to develop the museum."¹⁰⁴ PHMC "appoint[ed] a committee to define the role and mission of the

⁹⁹ PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 2.

¹⁰⁰ PHMC, "Blue Ribbon Report and Committee Specific Sites," interview by author, June 2020.

¹⁰¹ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981.

¹⁰² PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 4.

¹⁰³ PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 4.

¹⁰⁴ PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 4.

museum and memorial in relation to other PHMC programs[museums]."¹⁰⁵ Even after the 1997 Committee ranking that assigned the Military Museum in the bottom and deaccession recommendations, the Museum was still retained with efforts to be made in "partnership with the Friends of the Pennsylvania Military Museum"¹⁰⁶ and Penn State University at State College, Pa. Since the 1997 report the Museum has been awarded funds for capital projects for renovation and exhibits. In the 2009 Feasibility Report done by PHMC, the Museum was recommended to be retained by PHMC and to continue to enhance its relationships with community organization, most importantly the Pennsylvania veterans who utilize the site for special events throughout the year.¹⁰⁷

Despite its continued recommendations for deaccession it was retained for over forty years. Currently the Pennsylvania Military Museum is the only site that PHMC fully administers that did not receive a "Most Important" ranking in the Blue Ribbon's 1981 result and fell below the 12th ranking in the Committee's 1997 result. Unlike the other three sites, this typology appears to be unique to sites that PHMC views as museums that have a strong potential for growth. Further investment by PHMC has proven to be beneficial to the success of the site in terms of community engagement, even if the museum does not draw paid visitation.

¹⁰⁵ PHMC, "Blue Ribbon Committee Report." Unpublished, October 20, 1997, 4.

¹⁰⁶ PHMC, "Plans for the future of the historic sites and museum programs," 1997, 4.

¹⁰⁷ PHMC, "Planning our Future: Sustainability Committee Final Report", March 4, 2009.

Chapter 4: Discussion

Evolution of PHMC Budget Cuts:

Initially, this thesis's methodology was established to explore in detail which factors were causing individual sites to be deaccessioned. However, it was quickly established that the top factor at each site was the total available funding allocated to PHMC. With the 1980 - 1981 round of funding cuts, "the national economy caught a cold; Pennsylvania came down with pneumonia."¹⁰⁸ The Commonwealth during this time held a 2.8 billion dollar deficit that would not be resolved until 1988.¹⁰⁹ However, funding cuts would prove to be more of a challenge for states in general as they were unable to spend past their budget and create a deficit, unlike the Federal Government, which was able to do so to cover its costs.

The initial deaccessioning Report in 1981 was the first to tackle the PHMC funding cuts, as the organization was faced with a potential 9% reduction that could result in the layoff of ninety-one employees and the closing of seven sites.¹¹⁰ However, the Executive Director of PHMC at the time, William Wewer, clarified that the "18% inflation in the country"¹¹¹ would result in even more significant cuts as the overall value of the dollar

¹⁰⁸ Tambly, Bud, Reviewer, "State eyes closing of two Bucks Museums," *The Morning Call*, December 4, 1980.

¹⁰⁹ "Richard Thornburgh, PHMC, accessed July 10, 2020.

<http://www.phmc.state.pa.us/portal/communities/governors/1951-2015/richard-thornburgh.html>

¹¹⁰ "Richard Thornburgh, PHMC, accessed July 10, 2020.

<http://www.phmc.state.pa.us/portal/communities/governors/1951-2015/richard-thornburgh.html>

¹¹¹ Tambly, Bud, Reviewer, "State eyes closing of two Bucks Museums," *The Morning Call*, December 4, 1980.

shifted down, but costs rose. This downward spiral of budget cuts continued sharply as a prime factor of concern in 1997, 2009, and 2012 PHMC reports.

In 2010 the Commonwealth's budget eliminated the 4.9 million dollar budget for PHMC's Museum Assistance Grant. A report put forth by The Education Policy and Leadership Center (EPLC) in 2012, in light of another 3% cut to PHMC, observed that since 2009 "PHMC's operating budget has been reduced by 23%."¹¹² The Report also notes the entire Commonwealth's funding for museums and historic preservation was "reduced by 38 percent."¹¹³ In response to these recurring million dollar cuts, PHMC continued to construct and implement disposition plans for its historic sites, staff, and collections. 2017 marked the first fiscal year in decades of budget cuts that resulted in a less than 1% cut for PHMC, which fortunately resulted in no outright ramifications for the organization.¹¹⁴

Case Study Site Response: PHMC Report

For this thesis administrators of each of the four case study PHMC sites were asked about three topics: their site, about their respective Friends Groups' perceived awareness about PHMCs ranking of their historic sites for highest and best use, as well as the response to the Blue Ribbon Report (1981) and Committee (1997) (See Appendix A). Based on the responses, none of the four sites had any recollection of their site's response

¹¹² PHMC, "Planning our Future: Sustainability Committee Final Report," Unpublished, March 4, 2009.

¹¹³ Commonwealth of Pennsylvania , PA Office of the Budget, 2006-07 Enacted Budget Line- Item Appropriations. Accessed July 2020.
http://www.portal.state.pa.us/portal/server.pt/community/past_budgets/4571.

Commonwealth of Pennsylvania , PA Office of the Budget, 2011-12 Enacted Budget Line-Item Appropriations. Accessed July 2020

¹¹⁴ O'Connell, Patrick. "PHMC Deaccession: Morton Homestead." interview by author, June 27, 2020.

to the Report, nor were the sites aware of what that ranking was. The following were the questions asked:

1. Are you aware of the Blue-Ribbon Report or Committee and their ranking of the site? (Review:1981 and 1997 ranking)
 - a. If there was a change in ranking, why do you think this change occurred?
 - b. Why, in your opinion, was the site kept through the 80-90s?
2. Describe the transition from PHMC to your organization. (Conditions, ownership, duration of discussions.)
3. Were there previous attempts at transitions that you are aware of?
4. What were the main factors that lead to the deaccession of the site? (e.g, funding issues)
5. Are there supporting Friends Groups on the site?
 - a. Had they existed to support the site prior to transition?
6. What was the community response to DCNR taking on the site?
7. What is the current status of the site?
 - a. How is the site in comparison to pre and post its transition?
8. Has there been major changes after moving to your organization? (Programming/ Attendance/ Site Narrative)

The goal behind these questions was to get a structured response from each of the sites that could be comparable but leave room for additional discussion to be had at the

discretion of the site. The following is a compilation of questions and analysis to understand whether and how the Reports have played a role at the sites.

- I. *When asked about the attributed ranking of their given site shifting between 1981 and 1997, only one site was able to confidently state why that change might have occurred.*

The current President of the Prospect Park Borough council, Patrick O'Connell, was unaware of the 1981 Blue-Ribbon Report and 1997 Blue Ribbon Committee and the assigned rankings for Morton Homestead, which the Council currently manages. O'Connell speculated that the increase in ascribed importance over the two reports was a direct result of the momentum carried¹¹⁵ over from the Bicentennial that was focused on history. Similarly, the Assistant Director of DCNR, Jason Zimmerman, who conducted the Washington Crossing transition to DCNR in 2016, was unaware of that site's previous evaluations and rankings conducted by PHMC in 1981 and 1997. Zimmerman was also unable to determine any factors that would explain the drastic change in site ranking in 1997 but felt that "in terms of national significance I can't see how it couldn't be ranked higher than some of the other sites."¹¹⁶ PHMC, which is currently partnering with the Friends for Daniel Boone group to operate the Daniel Boone Homestead, expressed identical speculation as to why the site's ranking would have so drastically changed. However, PHMC conveyed that during the initial ranking of the Military Museum, the site had only been in operation for about twenty years and maintained a permanent display,

¹¹⁵ O'Connell, Patrick. "PHMC Deaccession: Morton Homestead." interview by author, June 27, 2020.

¹¹⁶ DCNR, Zimmerman, J., "Washington Crossing Deaccession by PHMC," interview by author, June 2020.

with a mission that drove it to be seen much “more as the National Guard Museum”,¹¹⁷ rather than a statewide interpretation of the history of the military in Pennsylvania. Therefore, with its narrative that could be depicted elsewhere and decreased paid attendance, it was seen as a reasonable candidate to be moved out from under PHMC. Some of this pressure arose from the “tension between the Pennsylvania Military Museum and the State Museum about who collects what, in terms of military history,”¹¹⁸ that highlighted the redundancies at the Military Museum.

Based on these responses, the previous 1981 rankings of the historic sites, when viewed alone, were influential to the Type of deaccession avenue each site followed when paired with the current understanding of the ranking. The sites whose operations were in the majority or completely taken over from PHMC have some underlying correlation to the Type of heritage embodied at the site and how it relates to the local, regional, and state heritage. When paired with the definitive factor of funding, it is reasonable to assume that the less a site’s interpretation pertained to a narrative about the state as a whole, the more likely that site would be deaccessed through Type 1 or Type 2. If a site’s heritage, as seen at Daniel Boone and the Military Museum, was determined to be state focused, the higher the chances, given funding, it would be retained by PHMC for a longer period through Type 3 or 4, even if it had a lower ranking in the Reports.

This is in line with the intense focus by PHMC on State significance at sites being the most important to its organization, as discussed in Chapter 2. In order to secure

¹¹⁷ PHMC, “Blue Ribbon Report and Committee Specific Sites,” interview by author, June 2020.

¹¹⁸ PHMC, “Blue Ribbon Report.” Unpublished, October 8, 1981.

funding and effectively divide its resources PHMC must be hyper focused on type of significance when determining which site is to be retained and through which avenues the others will be deaccessioned. This mentality does provide an odd situation though, in which sites that have or are NHLs or are listed on the National Register are being ranked as less significant than their PHMC counterparts, and that their held status at the National level does not play a leading role in retention by PHMC.

II. *The sites were then asked to what extent did the Friends groups of the site react to the ranking and deaccession. Each response by the Friends group was different for each deaccession type.*

The “powerful and effective”¹¹⁹ Friends of Washington Crossing Historic Park (WCPC) was far less docile and more averse to the ranking given to the site by PHMC, immediately advocating for reconsideration upon the release of the rankings. As discussed in Chapter 3, the relationship between PHMC and WCPC was already strained, as both organizations were intertwined in the “state bureaucracy”¹²⁰ and made to “follow the procurement code that [PHMC] was bound by as a state property.”¹²¹ This relationship would cease to exist as the Friends group worked with local representatives to find a more suitable entity for the site after the 2009 budget cut that nearly forced the site to close. The site’s supporters who “supported change”¹²² responded cautiously but

¹¹⁹ DCNR, Zimmerman, J., “Washington Crossing Deaccession by PHMC,” interview by author, June 2020.

¹²⁰ PHMC, “Blue Ribbon Report and Committee Specific Sites,” interview by author, June 2020.

¹²¹ PHMC, “Blue Ribbon Report and Committee Specific Sites,” interview by author, June 2020.

¹²² DCNR, Zimmerman, J., “Washington Crossing Deaccession by PHMC,” interview by author, June 2020.

positively to the transferring of the property to DCNR, who aimed to have transparency with the Washington Crossing community.

From the perspective of the Morton Homestead's community, the reality of the funding cuts in 1997 came when the state was coming to remove its collection from the site and terminate the on-site staff and caretaker. The community was startled into action as moving vehicles were on-site, removing the collection and clearing out the Homestead. This response was directly related to the sense of loss that was felt from the outcome of the 1997 low ranking of Morton Homestead, which in turn had an immediate response by PHMC over the next decade. Unfortunately, in further response to funding cuts post-1997, PHMC also determined that it would only be able to maintain the site in the lowest capacity regarding the grounds and structure. In the early 2000s the response by supporters of the Morton Homestead was small but positive as the Borough and historic society pushed to be able to be involved as stewards of the site which was in dire need of repairs to its grounds.

The Daniel Boone Homestead's Friends Group had a similar reaction to the ranking of their site as those at the Washington Crossing Site. The Friends of Daniel Boone Homestead interpreted the recommendations for the site that it involves more local support as meaning, that "the state [is to] withdraw funding from the Daniel Boone Homestead",¹²³ and transfer the financial need on to the county. The most significant concerns of the supporters were the recommendations that the site did not solely convey

¹²³ Michael A O'Pake, Senator, Letter, Letter to Janet Klein, July 21, 1997.

PA heritage, which suggested the need for change in funding sources. Many of the 150 supporters of the Homestead sent requests for support and clarification to Michael A. O’Pake, local Senator of the 11th District at the time. O’Pake publicly stated that “[the Homestead] is not a local responsibility to preserve this prominent Pennsylvanian’s Birthplace. It’s not fair and it’s not right.”¹²⁴

While the PA Military Museum was not a traditional historic site at the time, it was viewed as the sole, if underutilized memorial for the Commonwealth's contributions to wars. There is no recorded reaction by the support group(s) of the museum or if one existed at the time. This potential lack of support differs significantly from other museum sites in PA that had a strong response, such as the PA Lumber Museum. It is possible that the newness and underdevelopment of the Military Museum was a driving factor of its retention and, in the time to come, it may yet be considered for transfer to another organization as previously proposed in the Report.

III. *Final analysis in relation to Typologies of Deaccession Avenues*

The clear divide between PHMC and WCPC that lasted for well over thirty years appears to be the secondary driving factor that led to the utilization of Type 1: Transferred to other government entities. Combined with the funding cuts, Washington Crossing’s strong community backing and its extensive land holdings made it an ideal candidate to

¹²⁴ Knudsen, Paul K., “Homestead Management change urged”, *Eagle Times*, July 24, 1997.

be transferred back to DCNR, which, as of 2016, operated 128 state parks and has continued to receive substantial funding from the Commonwealth.¹²⁵

The Daniel Boone Homestead was not transferred to DCNR because, at the time, its non-profit Friends Group was engaged in a contract¹²⁶ with PHMC, who allowed the use of the site while annually investing 240K dollars into the site for six paid PHMC site staff.¹²⁷ The Friends Group, therefore, was in the same position it had been in fifteen years before, when it was not financially stable enough to take on operations and management of the site. Therefore, Type 3: Partnered Property avenue, was utilized, which would allow the site to be deaccessioned to a different category but still partially funded by PHMC.

For the Morton Homestead, PHMC engaged in Type 2: Lease of Deaccession to the eager Borough of Prospect Park, which was granted autonomy for reinvestment into the grounds. However, by utilizing deaccession method type 2 of leasing the property grounds to the Borough, PHMC ensured that it would still have complete involvement in all future rehabilitation to the site without needing paid staff on-site to monitor the condition of the Homestead. Type 2: Lease differs significantly from Type 3: Partnered Property because PHMC is not funding the site, while Prospect Park Borough is.

Lastly, PHMC's Type 4: Retention of a site is utilized in the instances where a site is funded entirely by PHMC. In the case of the Military Museum, its site and original location were retained due to the perception that enhancements could be made for the

¹²⁵ DCNR, Zimmerman, J., "Washington Crossing Deaccession by PHMC," interview by author, June 2020. DCNR does get budget cuts, but in total their budget has been larger than PHMC's.

¹²⁶ PHMC, "Blue Ribbon Report and Committee Specific Sites," interview by author, June 2020.

¹²⁷ PHMC, "Blue Ribbon Committee Site Data." Unpublished, August 11, 1997.

site and its exhibits. The Military Museum differs from the other sites that were in some capacity being negatively impacted by full operations and management by PHMC in either their inability to access resources or differences in utilization of the site.

Current Status of Sites

As of 2020, all four sites have seen varying degrees of positive growth and have upcoming plans at work.

Washington Crossing Historic Park

Under the four years of management by DCNR, the site's staff has increased to nine salaried employees with an additional ten seasonal employees. DCNR has also invested in a "capital project that is over 6 million dollars,"¹²⁸ that has focused on improving the Taylorsville structures that had been underutilized previously. The support by DCNR of the WCPC Friends Group has motivated them to revitalize interpretation of the lifestyle of the 18th century, and "they are raising sheep, and they are spinning wool [and] are putting grain in the grist mill,"¹²⁹ and selling fresh products. The Friends Group has also been able to reinvest into programming and, most recently, the renovation and reopening of the Park's historic grist mill.

Regarding the positive growth seen at the Washington Crossing Historic Park, PHMC expressed that "you're going to fare better if you're getting more resources through one agency or another."¹³⁰ PHMC also is aware that DCNR proposed to put staff

¹²⁸ DCNR, Zimmerman, J., "Washington Crossing Deaccession by PHMC," interview by author, June 2020.

¹²⁹ DCNR, Zimmerman, J., "Washington Crossing Deaccession by PHMC," interview by author, June 2020.

¹³⁰ DCNR, Zimmerman, J., "Washington Crossing Deaccession by PHMC," interview by author, June 2020.

and improvements into Washington Crossing that surpassed the annual site funding allocated for PHMC by the Commonwealth of Pennsylvania, ensuring that the site, as of now, is well taken care of. DCNR, in turn, has expressed that because they were able to build off PHMC's progress at the site, although "without inheriting [PHMC's] staff and their institutional skills,"¹³¹ the transfer would not have been as successful.

The Morton Homestead

The Prospect Park Borough has been approached by the Washington Rochambeau Trail Project¹³² which is incorporating the sites that were recorded as being encampments as Washington navigated his troops through the northeast "straight down into Virginia."¹³³ into a trail. The site has also been met with interest from the National Park Service, which is overseeing the development of the trail, and letters of support from the Daughters of the American Revolution who are charged with caring for the grave of John Morton. The Borough President feels that the current status of the site is positive with new projects underway and funding options being secured. For example, the Borough is looking to partner with PennDOT to replace the Route 420 bridge to allow for pedestrian travel, connecting to a part of the Eastern Seaboard Coast trail across the river. The site has been able to secure grant funding to develop and begin to implement a working master plan to rehabilitate the shore and grounds of the Homestead.

¹³¹ DCNR, Zimmerman, J., "Washington Crossing Deaccession by PHMC," interview by author, June 2020.

¹³² "Home." The Washington-Rochambeau Revolutionary Route. Accessed August 19, 2020. <https://w3r-us.org/>.

¹³³ O'Connell, Patrick. "PHMC Deaccession: Morton Homestead." interview by author, June 27, 2020.

The Daniel Boone Homestead

The site has seen lesser degrees of success in recent times as a result of budget cuts and the deterioration of the original Friends of Daniel Boone organization and its management contract with PHMC, PHMC however, still is well within its capacity to manage the site financially and has installed a capable site administrator to keep the Homestead operational during these months of transition. In the meantime, PHMC is working with the community to develop a strong support group that will in the future be taking over the Management Agreement for the Daniel Boone Homestead.

Pennsylvania Military Museum

Since the early 2000s, the Military Museum has seen dramatic improvement as PHMC honed its mission statement and collection to focus on the Wars that impacted the Commonwealth. The site has gone through a series of projects to renovate the structure of the museum, which was in a stage of deterioration prior to its reopening in 2005. Currently, the site is awaiting the funding for a Capital project to "better tell the story of the Commonwealth citizen-soldier, sailor, airman, and Marine in the 20th and 21st centuries."¹³⁴ The site has also developed a Friends group, and built networks with the Commonwealth's other military museums.

Evaluation of Deaccession Typologies

In keeping with the objective of the first 1981 Blue Ribbon Report, the last part of this thesis's discussion aims to evaluate the highest and best use methodology regarding

¹³⁴ "Museum Shrine History," PA Military Museum, Accessed June 29, 2020, <https://www.pamilmuseum.org/museum-shrine-history>

the four explored deaccession avenues. Based on the current state of the four historic sites, the response from the sites, and its support groups, the four types have been placed in three categories based on overall results in finding the highest and best use for sites. The categories are: Most Successful, Less Successful, and Least Successful. These categories also take into consideration the overall pros and cons of each deaccession typology.

Most Successful: Type 1- Transferred to Other State Government Entity

As seen in the Washington Crossing Historic Site example, this Type of deaccession ultimately provides the best route for sites. In this case, transfer to another State Government Entity, the “highest and best use,”¹³⁵ was determined and implemented fully, which has allowed the site to flourish.

As a Government entity, DCNR's main contributions to Washington Crossing is an increase in overall funding that has given the Friend's Group a higher degree of autonomy for their projects for the Park. Stabilized funding allows sites to undertake and complete capital projects to enhance the sites that were previously grounded in the planning stages. More funding allows for the hiring of more staff who can provide more tours and increase hours of operation. The additional staff in turn helps the workload of the site be conformably split between repairs, collection management, and visitor engagement, which causes the site to rely less on Friends Group for funding, staffing, or other operational support. With less demand on Friends Groups and more autonomy, the

¹³⁵ PHMC, “Blue Ribbon Report.” Unpublished, October 8, 1981, 2.

groups can focus on creating their own programming, obtaining grants, organizing fundraisers, and may invest in the site with DCNR's permission.

Even with its overall success, the transferring of a historic site still has funding levels as the main drawback that overshadow any government entity. While DCNR does have a significantly larger budget than PHMC, it has still been subjected to budget cuts, which could result in the defunding of the historic site again. Therefore Type 1 does not pose a permanent deaccession solution. Additionally, DCNR is still part of the bureaucratic process and has the potential to be bogged down under the weight of requests and budget to and from PHMC, which ultimately still owns the site. Lastly, while PHMC does not have any direct involvement in the transferred historic site, it still retains permanent ownership and therefore monitors the site. Any breach of the transfer agreement in principle would cause the site to revert to PHMC and inevitably start the deaccession process over.

Less Successful: Type 3 - Partnered Property & Type 4- PHMC Retained

Type 3 and Type 4 are grouped together as they are one level removed from each other regarding the amount of management and operations performed by PHMC. In Type 3, PHMC retains a significant involvement in a site, as seen at the Daniel Boone Homestead, and in Type 4, PHMC is the sole manager of the site, as seen at the Military Museum. These types are considered less significant because both options provide for the potential for annual funding and staff cuts, but with potentially significant drawbacks that may not necessarily be the best and highest use for the site.

Additionally, Partnered and Retained sites receive funding from PHMC that help support utilities, management, and staffing of the site. However, funding is not guaranteed as annual budget cuts can greatly diminish funding and staffing to Type 3 and 4 sites and, in turn, site operations.

Type 3 allows for paid staffing to be supported by a Friends Group along with PHMC staff, allowing the Group to have an elevated level of autonomy compared to Type 4 sites. This partnership presents a favorable situation as PHMC does not have to invest as much into staffing for the site, and the Friends group can develop uses and programming for the site. However, as a partnered site, the majority of decisions made by the management group needs to be approved by PHMC, which can be timely and tedious if proposals do not conform to the Management Agreement.

PHMC and volunteers only staff type 4 deaccession sites; this allows PHMC to be directly involved in the management of the site, its use, and programming. However, funding cuts pose a more substantial risk to Type 4 sites as no Management Agreement is in place to compensate for the loss of staff due to budget cuts. As a result of these risks, sites can potentially close quickly in order to divert funding elsewhere.

Least Successful: Type 2 – Leased to Municipality

The leasing of Morton Homestead to the Prospect Park Borough has been the least successful Type of deaccession by PHMC thus far. The weak points of this Type lie in the lease itself, which presents more steadfast terms regarding use, repair, and alteration to the historic structure than applied to other deaccession types which are given access to the structures. In particular, the lease gives the Borough management over the grounds,

but not the building. Therefore, the Borough is barred from making any alterations to the building without prior approval from PHMC, even if the change, like a new roof or the boarding up of windows, would help protect the interior of the structure. The lack of access to the building and the removal of the Homestead's collection back to Harrisburg presents challenges of interpretation for the site; though, with the proper erection of climate-controlled storage, the site could see the return of its collection; though this is not guaranteed. The housing of a sites collection off site was a common occurrence after the 1997 budget cut, however, sites that are leased without access to the structure do not have the collections returned until they can properly support a climate controlled environment. Additionally, since the site is being funded through the Borough, there is no consistency in being able to rehire interpreters or staffing to utilize the constructed visitors center and exhibit on site. Furthermore, because this is ultimately a lease, that is not made with private parties, any violation of the terms of the lease in principle will result in the structure and grounds returning PHMC, despite its minimal prior interaction with the site.

Even though, as a deaccession method, this Type is the least successful, it has the most amount of promise in terms of having the potential to reinvigorate a community's passion for its historic sites. The lease allows the Borough's historic asset to be placed back into the hands of the community to foster support for the Homestead, as seen in the other Types who could be relied on to manage the site in the future. Leasing the property from PHMC allows the site's grounds for reinvestment that would have previously been restricted if the group was a non-profit organization partnering with PHMC that would

result with capped funding and portions of funds going to PHMC directly. With independent funding streams and access to the grounds, the Borough could hypothetically make positive improvements to the site and determine the highest and best use within the confines of the lease. Finally, even though PHMC is not directly involved with the site, it remains affiliated with the Homestead, and ultimately its branding helps propel the site and stabilize site visitation.

Federal Process

In 1988 the National Park Service developed their own version of the Placed Properties Program called the Leasing Program which allowed them to identify sites that were not directly contributing to the parks and themes of NPS. This program would be able to Lease structures, similar to PHMC's Type 2, to be utilized, but is to comply with NPS's Mission and the General management plan for the site. Haight Shutt in her 1991 thesis synthesizes that "NPS through the implementation of its leasing program has undertaken a preservation strategy involving private interests for the preservation of public resources."¹³⁶ Unlike PHMC, the sites that are engaged in the leasing program are opened up for bidding from developers and investors that will change the trajectory of the site depending on if a site is proposed to be rehabilitated or restored. PHMC's Leasing program ensures a universal standard amongst all their leased properties to prevent unnecessary alterations to sites. PHMC's approach provides a safeguarded approach to disposition that leaves PHMC with the final say versus the highest bidder.

¹³⁶ Haight Shutt, Alexis. "Models for Protecting Our Heritage [...]"

The Federal disposal for transfer and selling of property also differs from PHMC in terms of protection for the property by the lessee. PHMCs guidelines for transferring or selling a priority have a higher level of monitoring and fail safe to ensure the continued preservation of the property, even if privately owned. Under Federal Law, property disposal of a historic property triggers a Section 106 Review to determine if there will be “adverse effects on [the] historic property.”¹³⁷ However, unlike PHMC’s conditions, even if adverse effect is found it will not prevent the purchasing agency from conducting alterations to the structure, simply that it must document “its rationale and demonstrate that it considered the comments of the Advisory Council on Historic Preservation”¹³⁸ and present this to the public. Therefore, PHMC overall provides a more regulated and well thought out process as a state organization than what is allowed by the Federal level.

¹³⁷ "Real Property Utilization & Disposal." GSA. April 07, 2020. Accessed August 19, 2020. <https://www.gsa.gov/real-estate/real-estate-services/real-property-utilization-disposal>.

¹³⁸ "Real Property Utilization & Disposal." GSA. April 07, 2020. Accessed August 19, 2020.

Chapter 5: Conclusion

PHMC is an organization that was created to protect the historic resources of Pennsylvania. Despite PHMC's mission statement to be the "Stewards of the Commonwealth's heritage,"¹³⁹ the resources received from the Commonwealth that would enable it to fulfill its mission has steadily plummeted over the past forty years. Nevertheless, this turn of events runs counter to the perceived expectations in the 1960s that increasing the number of sites would result in more state legislature support, and therefore more annual funding. Instead, as a result of funding cuts, PHMC was forced to stretch its finite funding across the fifty-seven sites that it had committed to maintain and operate to the best of its ability. Even so, the Commonwealth then turned a critical eye upon PHMC twice, with the proposition that fewer sites to care for meant a more substantial portion for the retained sites (a proposition that of course presumed a more or less static level of overall funding).¹⁴⁰

The 1997 mandated report and recommendations did not mark the end of PHMC's need to continue to transfer, lease, and partner sites in response to funding cuts. For example, a multimillion-dollar budget cut for PHMC in 2009, which only makes up 0.06% of the Commonwealth's budget, required it to lay off a third of its staff at sites and

¹³⁹ Nichols, Roy F. *The Pennsylvania Historical and Museum Commission; a History*. 1967.

¹⁴⁰ PHMC, "Blue Ribbon Report." Unpublished, October 8, 1981, 2.

internally.¹⁴¹ During a 2009 interview concerning these budget cuts, previous Executive Director Barbara Franco expressed

If the state continues to disinvest in the programs and the operations of these sites, it does call into question whether we are still in line with what the legal mandates of the commission and what the constitution says are the responsibilities of the state. (Thompson & Murphy 2009)¹⁴²

A decade later, as PHMC sites are currently closed due to the Covid-19 pandemic, it raises the question of whether or not there will be another funding cut. Furthermore, if there is another funding cut, will any of the remaining core fourteen be deaccessioned? How many? If PHMC is whittled down to the point of no longer being able to steward sites, then has the Commonwealth legally upheld its mandate to protect its heritage? How are other state historic agencies facing the same threat? Moreover, at what point does the totality of a state's heritage that is owned by that state become "At-risk?"¹⁴³

These questions were brought to attention in a 1991 Master's thesis in Historic Preservation by Alexis Haight-Schutt, which broadly analyzes how the Federal, State, and local levels performed deaccession of publicly-owned historic through transfer or privatization. In her closing remarks, following her proposed Deaccession Guidelines, Haight-Schutt made a final stand to convey that,

¹⁴¹ Thompson, Charles and Murphy, Jan, "Cuts at Pennsylvania Historical and Museum Commission Provoke Talk about Who Should Be the Caretaker of State History," *The Patriot-News*, Pennlive. November 28, 2009. https://www.pennlive.com/midstate/2009/11/cuts_at_pennsylvania_historica.html.

¹⁴² Thompson, Charles and Murphy, Jan, "Cuts at Pennsylvania Historical and Museum Commission Provoke Talk about Who Should Be the Caretaker of State History," *The Patriot-News*, Pennlive. November 28, 2009.

¹⁴³ PA at Risk: "Pennsylvania at Risk. Pennsylvania At Risk, a special issue of the quarterly newsletter, is a listing of endangered historic properties across the Commonwealth" (Preservation PA)

As a result of diminish[ed] public funds and budgetary problems, the preservation movement is at a crossroads: the public needs to become involved with the protection of its cultural heritage – the non-profit organizations committed to historic preservation can no longer be expected to carry the burden alone. (Haight Shutt 1991)¹⁴⁴

Nearly thirty years later, Alex Haight- Schutt's observations and cry for the public to join in the struggle to preserve its heritage is still alive and well.

PHMC, to its immense credit, developed and shouldered the reality that its mission statement would need to be expanded to include the deaccession of sites if a more proper use for administrative stewardship regarding ongoing care and operations could be identified. The four typologies of deaccessioning identified in this thesis were constructed by PHMC over fifteen years, as identified stewards pushed back against the dilemma that they would now be responsible for their historic site once again. PHMC's avenues of deaccession were by no means perfect, but they are representative of solutions that were developed from scratch and required continual adjustment and effort on all parties involved in a historic site.

On the part of PHMC, much time was spent in carefully creating and developing guidelines to prepare the transition of historical sites. The debate was held over defining what 'historical' means and determining a way to rank and identify the value of intangible heritage. Support has been given to sites in cultivating new programs and accumulating new members to cultivate a line of stewardship into the next generations. An effort is

¹⁴⁴ Haight Shutt, Alexis. "Models for Protecting Our Heritage: Alternatives for the Preservation of Public or Non-Profit Owned Historic Resources." ScholarlyCommons. University of Pennsylvania, Page 67. 1991, https://repository.upenn.edu/hp_theses/411/?utm_source=repository.upenn.edu%2Fhp_theses%2F411.

being made by current PHMC staff to ensure the consistency and clarity of the Management Agreement so that all sites function under the same guidelines as PHMC shifts its involvement in sites; previously each site had a yearly version draft for the site, now there is an ongoing template that is detailed.

Commission and PHMC staff through the decades have contributed precious hours for the successful implementation of the Placed Properties program for forty-seven out of sixty of PHMC's historic sites. Seasonal publishing by Preservation Pa of the "PA At-Risk" list urges for an understanding of the value of the Commonwealth's heritage, which needs to be reached before budget cuts result in the further loss of historic fabric due to lack of protection.¹⁴⁵ More awareness needs to be given to the adaptability of organizations like PHMC, which, when faced with cut after cut, continue to program, support, and work with government entities, municipalities, and historic site Friends groups to ensure the longevity of the site long after their control by PHMC has ended.

Therefore, it should be recommended that a similar thesis be conducted each consecutive decade to record and evaluate the deaccession changes potentially to come by PHMC as well as those performed by other organizations of the Commonwealth, other states, and National organizations such as NPS. Further research should also evaluate whether and how deaccessioned sites have retained their historic integrity to the degree and in the manner anticipated in their Deaccessioning Management Agreements.

¹⁴⁵ PreservationPA, Accessed August 13, 2020. <https://www.preservationpa.org/>

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Appendix A: List of questions – Interviewer: Author

1. Are you aware of the Blue-Ribbon Report or Committee and their ranking of the site? (Review:1981 and 1997 ranking)
 - a. If there was a change in ranking, why do you think this change occurred?
 - b. Why, in your opinion, was the site kept through the 80-90s?
2. Describe the transition from PHMC to your organization. (Conditions, ownership, duration of discussions.)
3. Were there previous attempts at transitions that you are aware of?
4. What were the main factors that lead to the deaccession of the site? (i.e funding issues)
5. Are there supporting Friends Groups of the site?
 - a. Had they existed to support the site prior to transition?
6. What was the community response to DCNR taking on the site?
7. What is the current status of the site?
 - a. How is the site in comparison to pre and post its transition?
8. Has there been major changes after moving to your organization? (Programming/ Attendance/ Site Narrative)

Appendix B: 1981 Report, Ranked Sites: Most, Less, Least

Most	Less	Least
Ephrata Cloister	Washington Crossing	Somerset Historical Center
Landis Valley Village & Farm Museum	Bushy Run Battlefield	Admiral Peary Park
Old Economy Village	Daniel Boone Homestead	Bloody Spring
Railroad Museum of Pennsylvania	Scranton Iron Furnace	Capt. Phillips Rangers Memorial
Pennsbury Manor	Pitthole City	Curtin Village
Cornwall Iron Furnace	PA Military Museum	Fort Augusta
Erie Maritime Museum	Brown's Mill School	Fort LeBoeuf
Flagship Niagara	Cashiers House w. Custom's	Fort Loudon
Drake Well	Custom House	French Azilum
Graeme Park	David Bradford House	John Brown House
Anthracite heritage Museum	McCoy House	Johnston Tavern
Joseph Priestly House	Robert Fulton Birthplace	Mather Mill
Brandywine Battlefield	Searights Tollhouse	Nathan Denison House
PA Lumber Museum	Tuscarora Academy	Old Mill Village
Conrad Weiser Homestead	Warrior Run Church	Old Stone House
Fort Pitt museum		Peace Church
Hope Lodge		Sodom School
Museum of Anthracite Mining		The Highlands
Morton Homestead		Thomas Hughes House
Gov Printz Park		
Old Chester Courthouse		
Pottsgrove Mansion		

Appendix C: 1997 Study, Blue Ribbon Report, PHMC

SITES	RANK
	10
Brandywine Battlefield	12
Bushy Run Battlefield	18
Conrad Weiser Homestead	15
Cornwall Iron Furnace	5
Daniel Boone Homestead	19
Drake Well Museum	7
Eckley Miners Village	8
Ephrata Cloister	1
Erie Maritime/ Flagship Niagara	6
Fort Pitt museum	16
Gov Printz Park	25
Graeme Park	9
Hope Lodge	17
Joseph Priestly House	11
Landis Valley Museum	2
Morton Homestead	24
Museum of Anthracite Mining	21
Old Economy Village	3
Pennsbury Manor	4
PA Lumber Museum	13
PA Military Museum	23
Pitthole City	22
Railroad Museum of Pennsylvania	3
Scranton Iron Furnace	20
Somerset Historical Center	14
Washington Crossing	5

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Blue Ribbon Committee,

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iv, v, 3, 4, 7, 14, 16, 18, 26, 31, 33, 36, 37, 39, 40, 41, 42, 45, 46, 47, 48, 49, 52, 55, 56, 62, 71, 73

Department of Conservation and Natural Resources: DCNR,

iii, 6, 29, 33, 34, 46, 47, 49, 50, 52, 53, 54, 56, 57, 71

Department of Environmental Resources: DER,

15, 30, 34

Daniel Boone Homestead

iii, IV, 6, 28, 38, 39, 40, 47, 50, 52, 55, 57, 70, 72, 73

Morton Homestead

iii, 6, 24, 28, 34, 35, 36, 37, 38, 45, 47, 50, 52, 54, 58, 72, 73

P.A Military Museum

iii, iV, 6, 28, 41, 42, 47, 48, 51, 52, 53, 55, 57, 72, 73

Placed Property

5, 17, 20, 21

Placed Properties

18, 26, 40, 60, 65

Partnered Property

ii, iii, 5, 6, 28, 38, 41, 55, 60

Transferred

iii, iv, 5, 6, 8, 25, 26, 27, 29, 30, 33, 34, 42, 51, 52, 56, 57

Management Agreement

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Washington Crossing

iii, 6, 20, 24, 28, 29, 30, 31, 32, 33, 34, 47, 49, 50, 51, 52, 53, 54, 56, 72, 73